DOCUMENT RESUME

ED 479 661 CE 085 273

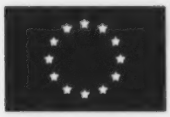
TITLE	Commission Staff Working Document: Lifelong Learning Practice and Indicators. Supporting Document to the Communication from the Commission Making a European Area of Lifelong Learning a Reality.
INSTITUTION	Commission of the European Communities, Brussels (Belgium). Directorate-General for Employment and Social Affairs.; Commission of the European Communities, Brussels (Belgium). Directorate-General for Education and Culture.
REPORT NO	SEC2001-1939
PUB DATE	2001-11-28
NOTE	28p.; For the memorandum "Making a European Area of Lifelong Learning a Reality" see CE 084 841. For other supporting documents, see CE 085 272 and CE 085 274.
AVAILABLE FROM	For full text: http://europa.eu.int/comm/education/policies/lll/life/communication/staff_en.pdf. For full text in French, German and Spanish: http://europa.eu.int/comm/education/policies/lll/life/index_en.html.
PUB TYPE	Opinion Papers (120)
EDRS PRICE	EDRS Price MF01/PC02 Plus Postage.
DESCRIPTORS	Access to Education; Accountability; Adult Basic Education; Basic Skills; *Educational Indicators; *Educational Innovation; Foreign Countries; Guidance; *Human Capital; Human Resources; Labor Force Development; Labor Needs; *Lifelong Learning; Policy Formation; *Resource Centers; Role of Education; Skill Development; Teacher Role; Theory Practice Relationship; Vocational Education
IDENTIFIERS	*European Communities Commission; *Learning Organizations

ABSTRACT

This document provides information relevant to the commission's communication on "Making a European Area of Lifelong Learning a Reality." Section 2 presents a selection of illustrative examples of lifelong learning in practice throughout Europe, grouped under these same priority areas used in the communication itself: valuing learning; information, guidance, and counseling; investing time and money in learning; bringing together learners and learning opportunities; basic skills; and innovative pedagogy. The examples show how various actors implement lifelong learning and explain what the priorities for action mean in concrete terms. Section 3 addresses (in greater detail than in the communication) these two important tools for delivering lifelong learning: learning organizations and local learning centers. Section 4 provides further information on the development of indicators that can be used for monitoring the implementation of lifelong learning throughout Europe. Monitoring indicators to be developed for each priority area are proposed and discussed. Appendixes include 8 references and 18 endnotes. (YLB)

Reproductions supplied by EDRS are the best that can be made
from the original document.

ED 479 661



EUROPEAN COMMISSION

Directorate-General for Education and Culture
Directorate-General for Employment and Social Affairs

Supporting Document to the Communication from the Commission
Making a European Area of Lifelong Learning a Reality

COMMISSION STAFF WORKING DOCUMENT

LIFELONG LEARNING PRACTICE AND INDICATORS

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☑ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

PERMISSION TO REPRODUCE AND DISSEMINATE THIS MATERIAL HAS BEEN GRANTED BY

A. Dumont

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

1

November 2001

BEST COPY AVAILABLE

CE065273

COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 28/11/01
SEC(2001) 1939

COMMISSION STAFF WORKING DOCUMENT

Lifelong Learning Practice and Indicators

1. INTRODUCTION 3
2. ILLUSTRATIVE EXAMPLES OF LIFELONG LEARNING PRACTICE 3
2.1. Valuing learning 4
2.2. Information, guidance and counselling 5
2.3. Investing time and money in learning 6
2.4. Bringing together learners and learning opportunities 7
2.5. Basic skills 10
2.6. Innovative pedagogy 12
3. LEARNING ORGANISATIONS AND LOCAL LEARNING CENTRES 15
4. INDICATORS FOR LIFELONG LEARNING 17
4.1. Introduction 17
4.2. Developing indicators 18
4.3. Resources 22
4.4. Conclusions 23

1. INTRODUCTION

This document provides additional information relevant to the Commission Communication on "Making a European Area of Lifelong Learning a Reality" (COM(2001) 678 final) (hereafter referred to as "the Communication". The document consists of three parts. Section 2 presents a selection of illustrative examples of lifelong learning in practice throughout Europe, grouped under the same priority areas used in the Communication itself. Section 3 addresses (in greater detail than in the Communication) two important tools for delivering lifelong learning: learning organisations and local learning centres. Section 4, finally, provides further information on the development of indicators that can be used for monitoring the implementation of lifelong learning throughout Europe.

2. ILLUSTRATIVE EXAMPLES OF LIFELONG LEARNING PRACTICE

These examples of lifelong learning practice have been selected from the national reports, the reports by European NGOs and from other sources, in particular the joint Cedefop/Eurydice publication "National actions to implement lifelong learning in Europe" – all of which were important contributions to the consultation on the Memorandum on Lifelong Learning.[1] The selection of examples aims to show how lifelong learning is being implemented by various actors and, at the same time, to explain what the priorities for action mean in concrete terms. It is hoped that the examples, which may be innovative on a national, regional or local level but not necessarily on a European level, will serve as a source of inspiration when implementing lifelong learning. At present, we avoid referring to them as "examples of good practice" because some of them are still at an early stage of implementation or data on the outcomes and results is not yet available.

As indicated in the Communication, the Commission will continue to work together with the Member States and other actors, to develop a more systematic approach to identifying and disseminating good practice, an important tool in the open method of coordination. Notably, this will include the setting up of a European database on lifelong learning and the use of "peer review", among Member States' representatives or lifelong learning practitioners to help assess and disseminate good practice.

2.1. Valuing learning

Legal changes in the education and training system permitting the recognition of non-formal and informal learning

The Italian education and training system now increasingly recognises competences acquired in non-formal and informal settings due to agreements between the government and social partners. The 'Promotion of Employment' law sets out an approach to lifelong learning whereby competences can be certified irrespective of how they were acquired. Competences acquired through work should be assessed and potentially recognised in the same way as those acquired through formal institutions. (Italy)

The Dutch Knowledge Centre on Accreditation of Prior Learning

The Dutch government, in collaboration with vocational branches and sectors, has launched the 'EVC knowledge centre'. This is an upgraded version of EVC (*Erkenning van Verworven Competenties* – accreditation of prior learning), a set of procedures evaluating knowledge and competences acquired in non-formal and informal contexts and recognising them in the form of official certificates or diplomas. The centre is responsible for promoting the EVC policy in vocational organisations by providing information and developing procedures. The centre does not award qualifications but collects, processes and distributes information on the system. It acts as a catalyst by stimulating the interest of individuals, on behalf of the vocational branches and sectors, in establishing their own EVC procedures (Netherlands)

Documentation of non-formal and informal learning related to higher education

In Norway, a legal amendment enables applicants aged over 25 without upper secondary education to study at a university or university college. On the basis of their non-formal and informal learning experiences, individual institutions determine whether applicants can be admitted to the relevant study programmes. In turn, the applicant, on passing an examination for a course obtains the formal general entrance qualifications. The applicant's previous learning experience may lead to the shortening of a course or exemption from examinations. *For autumn 2001, 4,700 people have applied to universities and colleges under this scheme.* (Norway)

BEST COPY AVAILABLE

2.2. Information, guidance and counselling

"Job City" (La cité des metiers)

"Job City" serves as a centre for information and advice on jobs and working life, where professional advisers provide guidance to all citizens – young people and adults, students and employees – over the entire course of their educational and vocational lives. Job City is a model of service to the citizen. It is free, and based on the principle of catering to each individual according to his or her specific needs. The service is delivered in a 'one-stop-shop' bringing together in one place, depending on the particular locality, institutions, specialist bodies and the world of production. (France)

"Prescriptions for Learning"

This project is directed at people attending doctors' surgeries in an area of Nottingham suffering from high rates of social exclusion. It is based on the link between poor health, poverty and low levels of educational attainment, noting that there are improvements in the mental and physical health of adults returning to learning. A Learning Adviser based in three GP surgeries works with individuals to help them access appropriate learning opportunities, offers them on-going support to maximise retention, achievement and progression. Collaboration between learning and health services has raised the awareness of the benefits of learning among healthcare staff and reduced barriers to learning by working with learning providers. The project has been successful in attracting 'hard to reach' non-participants in learning, many of whom had little or no previous formal qualifications. All referrals to the project have reported positive health benefits such as increased confidence, physical activity and strengthening of social networks. Longer-term evaluation will assess whether this model will improve retention and achievement, as well as leading to a reduction in the frequency of visits to doctor's surgeries and reduced medication such as anti-depressants and tranquillisers. (UK)

"The learning mediator"

In the Basque country, a new professional profile "the learning mediator", is being developed. This graduate in social sciences specialises in human resources attached to job-counselling services. At first, there will be eight learning mediators in the Basque country who will gather information on learning opportunities at a local level and help potential learners to identify their learning needs, contacting and encouraging learning providers to offer suitable learning solutions. (Spain)

BEST COPY AVAILABLE

The "Opintoluotsi project" – an Interactive Gateway for Educational Professionals

An interactive gateway to educational, training and employment opportunities for all citizens, the Opintoluotsi project aims to provide comprehensive and reliable information on all publicly controlled education. The staff of different educational institutions train to use the tool, and the site serves as a resources centre which allows staff involved in guidance to exchange professional expertise and access a virtual library. (Finland)

2.3. Investing time and money in learning

Pre-primary curriculum

In Sweden, local authorities are obliged to offer pre-primary education to all children from the age of 1 whose parents work or study. The introduction of the first pre-primary curriculum in 1998 aimed to place more emphasis on educational aspects and develop close links between pre-primary education, for children aged 6, and compulsory schooling. Children aged 4-5 will now benefit from at least 525 hours of pre-primary education a year. In order to increase participation, the Swedish government is offering grants to municipalities introducing limited enrolment fees for all such activities. (Sweden)

Voucher system in vocational higher education

The Netherlands has introduced a voucher system in vocational higher education, hoping to boost the freedom of students to choose courses. A student embarking on specific courses will receive 'right to learn' vouchers which are exchangeable at the institutions concerned. The voucher system implies that higher education will be funded differently. At present, institutions are paid directly by the government but under voucher arrangements payment will come from the students with the hope that the system will encourage institutions to provide attractive teaching conditions as logically institutions dependent on financing from their students will respond more to their needs and preferences. Experiments got underway in September 2001 in "HBO institutions" of vocational higher education and not universities. (Netherlands)

Tax deductions for individuals' investment in learning

Every learner in Estonia who pays for learning (or for his/her children's learning can apply for an income tax deduction corresponding to 26% of the cost. (Estonia)

BEST COPY AVAILABLE

2.4. Bringing together learners and learning opportunities

The open and distance university

In Greece, the open and distance university, which offered just two pilot projects in 1998, now has 5,000 students aged over 23 who can access around 20 courses organised to meet their requirements. They are supervised by tutoring advisers, use materials specially devised to encourage involvement and interaction on their part, and receive support from counselling centres located in six different cities. In 2001, 10,000 students are expected. (Greece)

Finglas community learning network

The project set out to develop Finglas, situated to the north of Dublin, as a Learning Community. Equal emphasis was given to the educational and social aspects of lifelong learning, which was defined as a way of life rather than a restricted subset of education and training. It focuses on leisure and work, old and young, and the gifted and challenged and maximises the use of ICT. The project provided the impetus for the development of lifelong learning competences by bringing together the resources of a wide local partnership. It encouraged the use of information technology at all levels of the community and brought Finglas into contact with similar Electronic Villages throughout the world. Twenty computers and two sets of video conferencing equipment were installed at partner sites, which enabled the citizens to have free access to training and Internet resources.

It provides:

- Open access to Information Technology learning facilities;
- Self-directed Computer Based Training;
- Distance learning through video conferencing;
- A community web site providing local community projects and companies with an opportunity to advertise activities locally and globally on the Internet;
- Active retired people, who trained to ECDL level and now assist local people operate the computers in the public library;
- A training development officer coordinates, trains and assists in development plans for project member sites. (URBAN project, Ireland)

BEST COPY AVAILABLE

Regional learning centres

In the Saalfelden/Salzburg region in Austria a particular kind of regional learning centre is being developed. The centre aims to meet regional needs through the creation of programmes to improving the access of disadvantaged persons to further education and training, particularly at post-compulsory level, in regions where training opportunities are scarce. A pilot regional training centre, supported by the European Social Fund (ESF) will be launched and tested from 2001-2006. Particular attention will be paid to the development of self-learning and on-line distance courses, 'second chance' schemes and university provision of continuing education and training in cooperation with regional educational centres. (Austria)

The development of the "competence based approach" (*démarche compétence*) in the Usinor group

In the late 1980s, the French steel company Usinor started to develop a competence based approach ("CBA"), where "competence" means a "validated operational know-how". The focus was no longer on posts in a rigid hierarchical structure, but rather on jobs ("*métiers*"), which allowed for a steady increase in qualifications and wages. The CBA was integrated in the overall business strategy and had to be endorsed by management at all levels. The approach has proved successful, both in terms of the satisfaction of personnel and the company performance. The CBA is characterised by:

- Integrating the CBA in the overall strategy of the company;
- Involving the company management;
- Setting-up tools for the identification of competencies;
- Involving all company stakeholders in tool design and implementation;
- Endorsing the CBA by top and middle managers;
- Developing evaluation and monitoring procedures of personnel competencies;
- Mutual adjustment between the organisation of the company and CBA;
- Highlighting, besides training, other means to develop competencies;
- Taking into account the effects of the CBA in human resources management. (France)

BEST COPY AVAILABLE

"Radiometer" - an enterprise that integrates training into daily production planning

In co-operation between management and the workers, Radiometer, which is a Danish medico-technical company, has adopted an innovative approach to learning:

- The "job 2 idea" - every employee gets the possibility of qualifying for a job in another department in the company (including through formal and informal learning). The company gets a more flexible workforce and is thereby able to have a stable use of their production capacity. On the other hand, the employee gets secure employment. This increases the motivation for training in general and gives the individual employee greater self-confidence.

- In close co-operation with a local adult learning centre, the company offers the employees literacy courses, language courses and ICT skills. Courses in Danish reading and writing are offered during working hours, whereas courses in foreign languages are based on a 50/50 deal shared equally between working time and employees' free time.

- ICT competences have been strengthened through a "home-PC-agreement" where employees get a tax-reduction on a PC for home use, if they are committed to use it to participate in a distance learning course.

All this is based on a yearly discussion with the individual employee about professional and personal development. Almost all the blue-collar workers participate in formal education and training (on average 5 days a year). 95 % of blue-collar workers did enrol in the home-PC-programme, committing themselves to 100 hours ICT training, primarily at home. Cooperation at all levels in the company leads not only to more training, but also to more flexibility, motivation and a "holistic" view of human resources development. All managers must accept and understand the impact – good and bad – that the training approach has on work, as they are key persons in motivating employees to participate in the training (Denmark)

BEST COPY AVAILABLE

The Union Learning Fund and Learning Representatives

This Fund was established in 1998 to help trade unions in England better influence employers, employees and others to take up learning at work and to boost their capacity as learning organisations. Some 2,000 "Union Learning Representatives" have been trained since then, mainly through the Fund. Evaluation has shown that they are very effective at encouraging workplace learning and development, particularly among workers with low levels of competences. Studies have also shown, however, that a major barrier to expanding the role of learning representatives is lack of formal recognition. In response, the Government is consulting on the proposal that union learning representatives be given formal recognition in the workplace, including a right to paid time off for their initial training and to carry out their duties. This would raise their profile and improve their effectiveness. As an example, the Fund supports a project at Birds Eye Walls' Humberside plants, enabling mainly part-time female employees to achieve formal non-vocational qualifications. Workers are invited to attend an assessment and then link up with a Learning Representative who helps them book the most appropriate local courses. A key factor is ensuring courses run at times when shift workers with families can attend – especially as the catalyst for many workers to participate has been a desire to keep pace with their children's education. (The UK)

Strategic Plan Kempen ("SPK") - 50 large companies helping small and medium-sized enterprises to expand

The "Plato programme" is an intensive support programme under which large companies support SMEs collectively and individually in all aspects of management. The large mentor companies made one or two managers available on a part-time basis and, at the expense of SPK, they embarked on intensive training in general management and in group-dynamics. The selected SMEs are sub-divided into groups of approximately 12 SME business-leaders and two managers-trainers. The training course, spread over two years, has four components: group sessions, individual support, seminars and informal activities like company visits and receptions. Plato stimulates business leaders continually to improve the management of their business with respect to, e.g. personnel policy, financing and marketing. An effective network is established between participants and the cooperating organisations and the project is a learning experience for both the SMEs and the large companies. This has created a positive dynamic in the region. (Belgium)

2.5. Basic skills[ii]

"Active citizenship and non-formal adult education in Europe"

Targeted at students and providers of adult education, the project will produce a 'handbook' in active citizenship to be disseminated to organisations and countries in and outside the partnership, comprised of schools in Denmark, Finland, France and Hungary, and a catalogue of 'best practice' in terms of teaching and learning active citizenship to be disseminated on the Internet. Finally, the project interviews people in the four countries on their definition of democracy and active citizenship to identify differences and similarities between those countries. (European Project)

BEST COPY AVAILABLE

The Second Chance School of Marseille

This school, situated in a "problem area" (Bégude), is open to unemployed young people without a diploma. The students alternate between studying in school and in an enterprise. The curriculum focuses on training the young person for work, in order to increase his or her self-esteem. The training programme comprises communication skills computer science, logic and mathematics, English, sport, and community skills. (European Pilot Project, France).

The ALBA project – Integration of low-skilled women into the labour market

Currently being implemented in several autonomous communities, the ALBA project provides low-skilled women with training opportunities and promotes their integration into the labour market, by providing basic education combined with initial vocational training. This was initiated as part of the Leonardo da Vinci programme in 1998. (Leonardo project, Spain).

"Lernkultur Kompetenzentwicklung" (Learning Culture and Competence Development) – learning at the workplace

The aims of this research and development programme launched by the Federal Ministry of Education and Research (BMBF) are to devise permanent and effective learning structures based on learning at the workplace, the enhancement of individual professional competences and the consolidation of strategies for keeping competences up to scratch in case of unemployment. The priority of the programme is to promote a learning culture of benefit not only to the learners but also to firms in helping them to improve their competitive position. The programme additionally includes projects to improve transparency, vocational guidance and the quality assurance of in-service training institutions, while also experimenting with new forms of certification, including recognition of informally acquired competences. Around EUR 18 million (from the federal government and the European Social Fund) have been earmarked annually between 2001 and 2007 for these projects to be carried out. (Germany, ESF)[iii]

BEST COPY AVAILABLE

Access of Persons with Learning Disability to Information and Communication Technologies (ALDICT)

This project is targeted at people with intellectual disability who often use the various European graphic symbol sets for communication. Symbols help people with intellectual disability to understand concepts and written words and can be used for 'writing' symbolised text. Starting from the program "Writing with Symbols 2000", the ALDICT project has developed an e-mail program for people with intellectual disability. There is no text and the user interface is entirely graphic. Users compose e-mail messages with one of the available sets of communication symbols and send them by simply clicking on an image or graphic representing the recipient. The program includes automatic translation; therefore symbol messages are translated between different symbols sets and several European languages. The program has been field-tested by more than 100 users with intellectual disability in France, Germany, Portugal and the UK. They were able to exchange e-mails and to communicate independently across language barriers for the first time. http://www.widgit.com/html/products/s_intercomm.html (Belgium)

2.6. Innovative pedagogy

"mySchool.lu – Internet portal for education (Un portail pour l'Education)"

The Centre of Educational Technology (Centre de technologie de l'éducation – CTE) has proposed to implement in 2001 the "mySchool.lu – Internet portal for education" project. This project will facilitate the creation at national level of a means of communication between the entire school community (pupils, students, classes, work groups, committees, administrators, ministries, etc.) and to further promote the use of information and communications technologies (ICT) as a means of educational support in all areas of education. An educational and technological monitoring group would be able to provide information on new ICT methods used in schools and thus contribute to the continuous training of teachers. (Luxembourg)

BEST COPY AVAILABLE

"Bridging the Gap" - Sustainable lifelong learning for the disadvantaged

"Bridging the Gap" is a project, running from 2001 to 2005, aimed at enhancing the educational experience of young people in Cork. A key principle of the project is that the issue of educational achievement should be addressed from a lifelong learning perspective. The project aims to bring about change in the quality of learning experienced by young people from disadvantaged backgrounds. It is being implemented in close collaboration with schools and other agencies working in local communities. Linking with state-funded initiatives targeted at maximising educational opportunity for all, 'Bridging the Gap' aims to establish Cork as a centre of excellence for educational inclusion. Schools, communities and individuals will be supported in their goals. Statutory and voluntary agencies will also contribute their expertise and experience, working together towards a common strategy. Building on the successful results of earlier projects, the project will develop a quality model of good practice that will have a positive impact on the school experience of learners. A total of thirty primary and ten post-primary 'disadvantaged' schools have been invited to participate. Initial research and development work of the project includes data gathering and analysis; consultation with key people in schools, communities and relevant agencies; a round table discussion on issues and possible solutions; and preparation of a strategy and an action plan for the later phases of the project. (Ireland)

The Learning Exchange - Knowledge and skill exchanging between individuals

The 'Learning Exchange' is an information system linking individuals via the Internet and through more than 20 different public media outlets – newspapers, magazines, and TV stations, who wish to share knowledge with each other. Mass media support was crucial for the operation. There are currently 3 local 'Learning Exchanges' with about 6,700 users who offer or seek knowledge such as languages, mathematics, music, computing and economics (Slovenia).

"Open Socratic School" projects

All over Europe starting from EU funded model projects, going for new teaching skills, extensive use of multimedia and the Net by pupils and teachers, restructuring time tables and room arrangements, working on projects with new roles for teachers in individual and group expert support, personal guidance, counselling. A document is available on the exchange of experience between all of the projects in Europe: "Teaching, Learning, Information: Towards an open Socratic school, Proceedings of the Ampere Seminar", February 1997, ed. by the European Commission Luxembourg, 1998 (Socrates project)

BEST COPY AVAILABLE

Knowledge and Competence in Popular Adult Education

This is a programme for teachers, trainers and other staff involved in adult liberal education. It was launched by the Finnish Association for Adult Education in 1998 for a five-year period. It is based on the assumption that the development of adult liberal education should be reflected in the growth of a distinctive profession. From this standpoint, courses have been devised not only to provide for the personal development of trainers but also their development as a specific professional community. The project seeks to launch studies to initiate newcomers to this kind of education, along with a drive to boost research in this field, which has hitherto not been widespread, and to enhance professional qualifications in the sector. (Finland)

The learning resource centre

The Inofor (Instituto para Inovação na Formacão) has set up a learning resource centre to improve the competences of those involved in education and training and ensure that their qualifications are appropriate to a learning society. Its aim is to provide an area for consultation and experimentation with new training methods, as well as for the exchange of experience and practical support to professionals in the field of training. It will be the fulcrum for a network of new generation centres that complement each other and are promoted by specialist training bodies. The certificates accrediting the teaching skills of trainers are limited to a period of five years, thus ensuring continual improvement in training quality. (Portugal)

BEST COPY AVAILABLE

3. LEARNING ORGANISATIONS AND LOCAL LEARNING CENTRES

This section describes the chief characteristics of "local learning centres" and "learning organisations", both of which are seen as important means of bringing together learners and learning opportunities, thus contributing to real opportunities for lifelong learning at the local level and in the workplace.

ESTABLISHING LOCAL LEARNING CENTRES[iv]

Multipurpose learning centres can help promote learning within communities and break down negative spirals of deprivation. Such centres should focus on responding to local and regional circumstances but the following aspects are seen as crosscutting:

- Centres should be located wherever potential learners are on a daily basis, meaning both formal and less formal settings such as schools, training institutions, libraries, the workplace, leisure and shopping centres and housing estates. Public libraries are particularly well suited to providing access to ICT and other resources with librarians acting as facilitators. Location should also take account of other means-dependent "access" factors such as transport and childcare.

- **Services for, about and in support of learning should be offered on a "one-stop-shop" basis**, such as: facilities for ICT skills development and wider e-learning; face-to-face learning including "tasters"; support for learners with particular needs e.g. learning or other disabilities, basic skill or language or generic study support needs; information, guidance and counselling on learning and related issues; and opportunities for learners and practitioners to communicate about learning needs, interests and experiences.

- Centres should be **resourced and staffed by multi-skilled practitioners from public, private and voluntary/community partner organisations**. Staff should be facilitated in the sharing and development of roles that cross professional and sectoral boundaries. **Collaboration with other service providers** (e.g. health, leisure and citizens' advice) enhances the effectiveness of proactive support services and promotes learning on a wider scale.

DEVELOPING LEARNING ORGANISATIONS

Any public, private or voluntary sector body can set itself the goal of becoming a learning organisation; the following example is of an enterprise.

- An essential first step is to assess existing competence levels and learning needs at the individual and enterprise level, leading to **competence development plans for all employees** and an overall plan **at enterprise level**. The latter should be negotiated with employee representatives and become an essential part of business planning.

- These development plans should carry **adequate learning resources**, in terms of funding for learning provision (e.g. external, internal, e-learning, on-the-job, mentoring/coaching schemes, supported self-learning in appropriately staffed libraries/learning spaces) and time (e.g. flexible working time, time accounts, educational leave).

- **Learning should be better linked with working** so that employees can learn from their work, as well as working better through learning. In this context, employees should be seen as potential "teachers" as well as learners. Regular feedback on the workplace as a learning environment should be sought.

- Learning enterprises should ensure **account is taken of employees' newly acquired competences** in their current jobs, as well as through recognition of non-formal and informally acquired competences in internal promotion or vacancy filling policies.

- Learning enterprises should build **links with other such organisations or learning partnerships** in order to feed into and benefit from good practice. Many enterprises also encourage employees to learn from **voluntary or civic experience** in the community and from other parts of their lives.

4. INDICATORS FOR LIFELONG LEARNING

4.1. Introduction

Comparable information and statistical measures are essential to the development and implementation of coherent and comprehensive lifelong learning strategies. Statistics in this field are an integral part of the work of both policy makers, who need succinct and highly abstracted information, and researchers, who provide concepts and detailed analysis to policy makers and the general public[v].

Statistics and indicators contribute to the **open method of coordination** which, in the field of lifelong learning, should facilitate the effective monitoring of progress against agreed objectives; comparison between and understanding of various national and local systems; identification of effective policies, and the identification of shared problems and priorities through the exchange of knowledge, good practice and experience.

Statistics and indicators aiming at monitoring progress in the implementation of policy objectives already form an essential part of existing initiatives at European level in the field of lifelong learning, particularly in the context of the European Employment Strategy[vi], the European Social Agenda[vii], the Communication on quality in work[viii] and the Follow-Up to the Concrete Objectives Report[ix]. Three key indicators relating to lifelong learning are also included in the 2001 Communication on Structural Indicators[x].

The Commission's Communication 'Making a European Area of Lifelong Learning' introduces a **lifelong learning framework** for education and training policy and eLearning policy, drawing these together in synergy with important elements of youth, employment, social inclusion and research policies. A new **learner-centred perspective** to lifelong learning is introduced, which implies that system-based statistical methods need to be revised. The Communication therefore proposes that **new indicators** should be developed within the framework of lifelong learning. This paper outlines how that development should proceed.

Work in progress on improving the statistical information

In addition to the statistics used for building indicators in the above mentioned policy fields, strategies and plans, the **Task Force on Measuring Lifelong Learning** has identified relevant existing sources of statistical information, and areas which need to be developed further at EU level in the short- and medium-term. In this context, the Labour Force Survey (LFS)[xi] *ad-hoc* module on lifelong learning is in preparation for 2003 and the European harmonised Adult Education Survey (AES) is proposed for 2005. In addition, the **Working Committee on Indicators of the Quality of Lifelong Learning** (hereafter the 'Working Committee'), which has been established at the request of Ministers of Education of EU and candidate countries, has also defined a number of areas for analysis[xii].

As a result of this work, several information gaps have been identified. It is clear from these that some important policy issues may hardly be measured at all. As such, **qualitative information** will form a significant part of future developments in the field of measuring lifelong learning.

4.2. Developing indicators

Fundamental principles of lifelong learning

The Communication specifies the three fundamental principles, which underpin coherent and comprehensive lifelong learning strategies[xiii]. Firstly, the **centrality of the learner** must guide the development and implementation of lifelong learning, and along with the principle of **equality of opportunity** implies a need to collect information representing all potential learners. This means that the coverage of statistical information must be extended to older people, currently excluded by some surveys; immigrants; people with learning difficulties, currently often excluded by system-based surveys. Special attention must also be paid to small enterprises, also presently excluded by most enterprise-based surveys. The principle of **high quality and relevance** introduces considerations as to the effectiveness of learning investments, and requires specific indicators to make it possible to link input and output/outcome measures.

Indicators to be developed according to these principles are outlined below. Under each 'Priority for action'[xiv], indicators for monitoring progress are highlighted. Further indicators for comparing systems, identifying effective policies and promoting the exchange of good practice, knowledge and experience are then outlined (*italics* indicates the title of the indicator). Although each indicator refers to a specific priority action area, many apply to several of the priorities.

The need for further development varies between areas and there are three broad situations. As regards participation and attainment, there are fairly adequate indicators. As regards investment in learning, there are adequate statistics, but it is necessary to establish suitable indicators which can make use of them. In most other fields, there is a clear shortage both of statistics and indicators.

General background

Several indicators help set the overall framework of lifelong learning and its role in today's society as an essential tool to promote employment and participation and to combat and prevent exclusion. Existing indicators measure the extent to which well-educated and trained people fare better in the labour market; such measurements relate principally to acquired competences and skills, based on formal qualifications as well as on participation in education and training activities after completion of initial education.

Recently developed surveys assess the effectiveness of **non-formal learning**[xv] in the workplace, and also of training provision for unemployed people. Indicators of 'transitions' – where people move between life situations – are also particularly relevant. These apply to target groups[xvi], such as school leavers, people changing economic sectors or moving abroad, women returning to the labour market. The *ad hoc* LFS module[xvii] on transitions was an important step towards understanding the relationships between learning and employment, unemployment and inactivity.

Valuing learning

Monitoring Indicator to be Developed
Number of certificates by field of study

The Working Committee identified **accreditation and certification**, as well as **quality assurance** and **coherence of learning supply**, both of provision and overall strategies, as the main areas for developing quality indicators for valuing learning.

There is an urgent need in this area, in which very little or no quantitative information exists, to develop measures for a sound **understanding of systems of certification** in different countries and learning contexts. Collections by Cedefop of information on certification providers by field of study will be a valuable contribution. Analysis of the use made of such providers (which will probably require specific surveys) should then provide information on: *Education and training institutions carrying out quality assurance themes; Relation of number of certificates by field of study delivered for participating in non-formal learning activities to the ones delivered for participating in formal learning (graduations) etc.*

Administrative sources could be used for *Information on take-up of learning portfolios,* while the AES could provide **information from the perspective of the learner** on *Attitudes and motivation towards learning* and *percentage of learning actions, which (potentially) lead to a certificate.* Also, information on *Employer's perceptions of training effectiveness in terms of staff retention, productivity, profits, management skills, staff absenteeism, adaptability (especially to innovation), job-related knowledge, problem solving skills, personal and social skills* could be obtained through enterprise-based surveys such as the Continuing Vocational Training Survey – CVTS. Such surveys provide useful information despite the fact that the data becomes available with a substantial time-lag and on an irregular basis.

A measure of the **effectiveness of learning**, and therefore a step towards valuing learning, could be the *Percentage of employed people among those who completed a training-for-unemployed people programme less than 12 months before* (from the Labour Market Policy database – LMP). In terms of the **attractiveness of learning,** the available indicator *Income by educational attainment level* could also be a useful measure.

Information, guidance and counselling

Monitoring Indicator to be Developed
Number of visits to EU and national portals on jobs and learning opportunities (including EURES)

Guidance has a crucial role to play in enabling people to have **individual learning pathways,** in relation to the **dissemination of information** at all levels as well as the impact guidance can have on people's **perceptions of learning**. Moreover, the Working Committee identified **guidance and counselling** as one of the main areas of lifelong learning where **quality** is paramount. In this area there are practically no available indicators at EU level.

There is a need to complement existing contextual information on arrangements for guidance and counselling at different geographical levels with information on people's **awareness of learning opportunities**, and **levels of satisfaction** with guidance services. A **classification of learning services (including guidance) activities** will be developed by the Commission in

the context of a classification of learning services and activities. To be effective, data collections in this area should address **individuals** as well as guidance centres.

This could then be extended to cover **'physical' structures/services**, on the basis of administrative information coming from Members States. In this respect it will be necessary to collect contextual information on the *Type of guidance made available* before proceeding to measures of the use of guidance (e.g. *Frequency of use of guidance structures*). From the point of view of the **individual (potential) learner**, the *Percentage of people who feel satisfied with the guidance offered* and the *Percentage of learners by type of learning action and by type of guidance/information (none, school, local centre, web)* could be obtained through the AES.

Investing time and money in learning

There is in this area a large supply of available measures.

The following existing indicators are identified in the Communication and will be used to monitor progress:

Public expenditure on education as a percentage of GDP, source: Unesco-OECD-Eurostat (UOE);

Expenditure on education/training in enterprises as a percentage of labour costs, source: Continuing Vocational Training Survey (CVTS);

Household expenditure on education as a percentage of total expenditure, source: Household Budget Survey (HBS).

The Working Committee, underlined that the whole area of **investment in lifelong learning** is of crucial importance. Indicators on public spending on **formal learning** have been available annually for a long time, e.g. *Public expenditure on education* (from the Unesco-OECD-Eurostat data collection – UOE). Information on *Private spending on education* (UOE) is also available.

As regards **non-formal learning**, progress has been made recently. CVTS provides data on enterprises' **financial investment** in training their staff (*Expenditure on education/training in enterprises as % of labour cost)*, as well as on **investment in terms of time** (*Percentage of working time spent by employees on training)*. Such data could be also collected annually via Structural Business Statistics (SBS). Information is also available on *Household expenditure on education (Household Budget Survey - HBS)*, *Expenditure to train unemployed people under active labour market measures (LMP)* as well as on *Benefits of learning and cost of learning (OECD)*.

Additional useful indicators are *Time planned for teaching different subjects in the curriculum* (Eurydice) and *Paid working time spend in training by subject in enterprises* (CVTS). The AES would improve the quality of information on volume and intensity of participation in different types of learning. The most detailed information on personal investment on time could be obtained through the Time Use Survey (TUS) where both learning within and outside working time could be covered, although this does not seem to be a feasible medium-term solution.

It is thus already possible to provide an almost complete assessment of investment in learning, although indicators should be established. On the other hand, data on investment in time should be further developed as indicated above.

Bringing together learners and learning opportunities

In this area there are practically no available indicators at EU level and it is too early to propose any monitoring indicators. Whether the accessibility of learning opportunities can be measured depends on the **situation of the learner**, and the **learning context** in question. For instance, whereas in rural areas physical distance from learning centres is a crucial factor, for people with disabilities the degree to which the learning context can accommodate the learner's disability is more important. Indicators can give a fair picture of the extent to which people may be excluded from learning, but to tackle the issue in depth, detailed and *ad-hoc* studies will be required. Sources on the proportion of providers of continuing education offering childcare and/or learning at flexible times also need to be explored.

Having identified such providers, information on the *Proportion of continuing education providers offering child-care facilities and/or flexible learning time arrangements* would also prove useful. Information on the *Perceived barriers/ obstacles to learning* from the perspective of the individual (including distance and disability) could be obtained through the AES. Information on *Employers' attitudes towards training (CVTS)* could indicate obstacles or incentives at enterprise level.

Basic skills

The following existing indicators are identified in the Communication and will be used to monitor progress:

Share of the population aged 18-24 with only lower-secondary education and not in education or training, source: Labour Force Survey (LFS);

Percentage of population, aged 25-64, participating in education and training, source: LFS;

Participation in education/training by field of study, source: UOE.

At present, most statistics on competence acquisition consist of **participation** in formal courses and formal **education attainment** rates. With the learner-centred approach to lifelong learning, however, along with the emphasis on non-formal and informal learning, the spotlight shifts towards the learner and his/her learning pathway. Particular attention is paid to competences acquired in non-formal and informal learning environments as well as formal settings, the (ongoing) process of acquiring competences, and (temporary) outcomes.

The Working Committee paid particular attention to this area and proposed developing indicators concerning literacy and numeracy, **new competences for the knowledge-based society** such as learning to learn, active citizenship, cultural and social competences, and overall access and participation. In this area, many indicators are available, even though there is a shortage of measures of competence levels.

Competence assessment indicators are necessary to take into account competence acquisition outside of formal and non-formal settings. There are different national and international approaches to assessing adults' competences, in areas such as literacy and numeracy and also, albeit to a lesser extent, in subjects such as ICT, foreign languages and learning to learn. These initiatives should be supported with a view to reaching a consensus on an **overall approach at European level**.

Indicators used already in other contexts include the *Proportion of the population 18-24 year olds with less than upper secondary education and not in education or training* (LFS), which

is related to early school leavers and should be supplemented by indicators on the degree of participation among adults; and *Adult participation in education or training* (LFS). The latter could be improved in the context of the AES. Information on the *Percentage of 15 year olds by competence attainment level in reading, mathematics and science (programme for International Student Assessment* - PISA[xviii]) gives some insight on competence acquisition by the end of compulsory schooling in most cases. Research could focus on information on knowledge of foreign languages, digital literacy, problem solving, and learning to learn, which is not presently available. Nevertheless, some proxy information is available on *Participation in education training by field of study* (UOE), and *Participation rates in language learning in schools* (Eurostat).

Innovative pedagogy

The following existing indicators are identified in the Communication and will be used to monitor progress:

Learning in enterprises by form of learning, source: CVTS;

Average number of pupils per on-line computer in schools, source: Eurobarometer.

The main gap in this area is for qualitative information and research on the evolution of teaching and learning methods in and outside education and training systems. The Working Committee proposed indicators in the areas of educators and learning and ICT in learning.

Some input measures may be considered important such as the existing *Number of pupils per computer connected to the Internet* (Eurobarometer) and others to be developed, such as the *Percentage of schools with partnerships with private organisations* and the *Availability and use of educational content and software in the national language.* The *Inclusion of ICT in initial teacher training* (Eurydice) or the *Participation of teachers in continuing training (including ICT training)* could provide an indication of the potential of learning facilitators to use innovative tools and methods (including ICT). *Learning by form of training* (available from CVTS), or other relevant information, which may come from a future AES would allow us to analyse forms of competence development and so could also be useful in this context.

4.3. Resources

The development of new data, indicators and sources on lifelong learning, as well as the review and revision of existing tools, means an additional burden for participating countries, at least in the short- to medium-term. This is because new approaches are first developed at national level, for example through pilot projects, and then this experience is built on when launching European level surveys.

The overall coordination and coherence of the development of new indicators will, in principle, be overseen through the network of 'sub-groups' formed to follow up the Report on the Concrete Objectives of Education and Training Systems. These groups will also play a valuable role in the identification of good practice for dissemination among Member States.

At European level, the Leonardo da Vinci programme (mainly the Reference Material measure), the Research Framework Programme (particularly in relation to socio-economic research) and Eurostat will probably remain the main instruments for financing statistical development (in the areas of vocational training, education, research and official statistics, respectively). Cedefop and Eurydice also provide essential support, especially by developing qualitative information.

4.4. Conclusions

European-level statistical collections on lifelong learning currently focus on learning systems; they principally cover formal learning in institutions for initial education and training, and some non-formal learning in enterprises. The focus on the learner and the learning process proposed in the Communication means that **information must be collected from individuals**. Some of the necessary information can be determined from existing sources in the European Statistical System, but **new sources are required to complete the picture**. Several Member States have recognised this need and have accordingly launched national surveys aiming to assess competence levels and learning processes, especially among adults. The Education and Training Statistics Working Group (ETSWG) supervises the joint technical work among European countries to make better use of existing sources and, where necessary, launch new initiatives.

Efforts currently being undertaken at European, national, and international (OECD and UNESCO in particular) level, show that there is a broad consensus regarding which aspects of lifelong learning should be measured. There is thus clear scope for ensuring **complementarity among national initiatives** and improving the **cross-country comparability of indicators**.

The first two steps towards improving the knowledge base on learners have already been proposed and should be supported by the Member States. Firstly, preparatory work for the development of the **LFS *ad-hoc* module on lifelong learning** for 2003 will see Member States and other participating European countries together assessing priorities and feasibility. This will then be an important step towards the **Adult Education Survey**, which the Commission has proposed for 2005, and which would make available some of the key indicators identified above. In addition, the employers' perspective would be covered should a third CVTS be launched.

For all this to happen, it is essential that the collaboration between the Member States, the Commission and other European and international institutions which has characterised the development of statistical and analytical tools in the recent past be continued and strengthened. The Commission will seek in particular to develop synergies where possible with the work of the OECD so as to make full use of the potential for transnational data collections and extend the geographical coverage of European surveys.

References:

2001 European Commission, Communication: "Making a European Area of Lifelong Learning a Reality."

2001 S. Pilos (Eurostat), "The report of the Task Force on Measuring Lifelong Learning", Eurostat working paper, also a CEIES paper.

2001 European Commission, note for the conference of the European Ministers of Education, Riga – Latvia, June 2001 "Policy relevant areas on quality of lifelong learning" (also presented at Parma but not on the web-page).

2001 W. Hörner (Statistisches Bundesamt), CEIES paper "The statistical recording of lifelong learning from the viewpoint of producers of statistics"

2001 T.S. Murray (Statistics Canada), CEIES paper "The producers' view".

The CEIES (seminar) papers can be found at http://forum.europa.eu.int/Public/irc/dsis/ceies/library?l=/seminars/measuring_lifelong

2001 EMCO Indicators Group paper (Indicators for Monitoring the Employment Guidelines 2001 - EMCO/19/310501/REV1)

2001 Supporting Document to the JER 2001: Annex on Key Indicators (SEC(2001) 1398 of 12.9.2001).

---

[i] National actions to implement Lifelong Learning in Europe, Cedefop and Eurydice, 2001 (available in English and French). Also available on the Internet: http://www.eurydice.org/Documents/Survey3/en/FrameSet.htm

[ii] As discussed in the Communication, basic skills include **foundation skills** (reading, writing and mathematics), **social and (inter)cultural skills** (ability to work in a team, ability to communicate, understanding of cultural diversity and heritage, foreign languages, values such as democracy, tolerance, respect for others and the environment), **personal skills** (motivation and ability to learn, autonomy, empathy, self-respect, problem-solving, risk-taking, creativity, entrepreneurship, critical sense, managing change) and **ICT skills** (basic ICT skills, ICT communication skills, and "technological culture").

[iii] "National actions to implement Lifelong Learning in Europe", p. 33

[iv] Following the Lisbon European Council, multi-purpose local learning centres were advocated by the Employment Guidelines 2001, and the eLearning Action Plan gave recommendations for the development and networking of such centres. More recently the e-Inclusion report supported by the High Level Group on Employment and Social Dimension of the Information Society (ESDIS) contains a section on Public Internet Access Points.

[v] A more extensive description of information needs can be found in Murray (2001).

[vi] The EMCO Indicators Group develops common indicators to monitor implementation of the Guidelines under the European Employment Strategy.

[vii] The Social Protection Committee Indicators Subgroup is preparing a report for the European Council of Laeken with a list of commonly agreed indicators on social inclusion.

[viii] Communication from the Commission "Employment and Social Policies: a framework for investing in quality" COM(2001) 313.

[ix] Draft detailed work programme for the Follow-up of the Report on the Concrete Objectives of Education and Training Systems COM(2001) 501 final.

[x] COM (2001) 619

[xi] This is the main source of most information on learning from individuals.

[xii] The work of the Task Force and the Working Committee was also taken forward at the **Parma seminar on measuring lifelong learning** in Italy, June 2001. This was organised jointly by the Advisory Committee on Statistics in the Economic and Social Sphere (CEIES), Eurostat and DG Education and Culture.

[xiii] See section 1.4 of the Communication.

[xiv] See section 3 of the Communication.

[xv] See section 1.4 and glossary of the Communication.

[xvi] See also section 2 of the Communication: "Coherent and comprehensive strategies for lifelong learning: *Facilitating access to learning opportunities*."

[xvii] The *ad hoc* module on transitions, a series of retroactive questions, is occasionally part of the Labour Force Survey. It was implemented in 2000 and a repeat is planned for 2004.

[xviii] OECD survey, see: "Knowledge and skills for Life - First results from Pisa 2000" (OECD, 2001)

European Commission
Directorate-General for Education and Culture
Rue de la Loi, 200 / Wetstraat, 200
B-1049 Bruxelles / Brussel
Tel.: 32-(0)2 299 11 11
E-mail: eac-info@cec.eu.int
http://www.europa.eu.int/comm/education/life/index.html

Directorate-General for Employment and Social Affairs
Rue de la Loi, 200 / Wetstraat, 200
B-1049 Bruxelles / Brussel
Tel.: 32-(0)2 299 11 11
E-mail: empl-info@cec.eu.int
http://www.europa.eu.int/comm/dgs/employment_social/index_en.htm

BEST COPY AVAILABLE

U.S. Department of Education
Office of Educational Research and Improvement (OERI)
National Library of Education (NLE)
Educational Resources Information Center (ERIC)

NOTICE

Reproduction Basis

[X] This document is covered by a signed "Reproduction Release (Blanket)" form (on file within the ERIC system), encompassing all or classes of documents from its source organization and, therefore, does not require a "Specific Document" Release form.

[ ] This document is Federally-funded, or carries its own permission to reproduce, or is otherwise in the public domain and, therefore, may be reproduced by ERIC without a signed Reproduction Release form (either "Specific Document" or "Blanket").